Patient Chart GUI Site Implementation Checklist

#	Site Activity	Who	Comments	Site Notes/ Comments	Completed?
1	Designate the site's Patient Chart Coordinator	Self identified or CMO	Often a clinical provider who is interested in the application will "self" identify. The Coordinator role is to understand the clinical functions of the application, to communicate effectively to other staff, and to organize the Workgroup		
2	Identify Patient Chart Workgoup	Coordinator	Interested clinical providers and at least one representative from IT, lab, pharmacy, contract care (if running RCIS) and data entry staff		
3	Download and review documents from Patient Chart web site (http://www.ihs.gov/CIO/GUI/ptchart/): ♦ Site Checklist ♦ Various Planning Worksheets ♦ User, Install and Technical Manuals	Workgroup	Workgroup members should be *generally* familiar with _all_ aspects of Patient Chart implementation planning, in addition to topics directly relevant to their Team roles.		
4	Identify the application features that the Workgroup wants to use.	Workgroup	As a first step, each workgroup member may want to fill out the *User Access Request* form available on web site (see below) to document which features will be used by individual users and by the clinic.		
4	Identify and document potential workflow changes.	Workgroup	Review the Workflow Change diagrams and associated worksheet (currently under development) available on web site (see below) to document existing workflow and identify possible changes to accommodate Patient Chart. Identify and plan the steps necessary to complete proposed workflow changes.		
6	Review hardware and software specifications for RPMS server.	SUD & Site Manager	Review IIA. *System Requirements* or the *Installation Manual*, section 2.0, available on web site.		

All documents referenced in this Plan, and additional information about Patient Chart, are located at **http://www.ihs.gov/CIO/GUI/ptchart**

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7	Review hardware and software specifications for user PCs (client). Identify your users' existing equipment and potential near-term needs.		Review IIA. *System Requirements* or the *Installation Manual* available on web site (see below). The *User Access Request* form and the *Technology Planning* worksheet (available on the web) will assist you to answer: ▪ Does your computer equipment meet or exceed the recommended requirements? ▪ Is your computer equipment located in the right place? ▪ Do you need additional computer or printer equipment?		
8	Identify and order equipment if needed	Coordinator, Site Manager, and Site management	▪ Present findings and justification from *Technology Planning* worksheet. ▪ Obtain approval, and initiate P.O. ▪ Order through standard site procurement process		
9	Select users for trial implementation. Determine roles and appropriate security keys.	Workgroup	If your site plans to implement ALL features of Patient Chart, including provider order entry, you may want to select a small group of users, or a clinic, pod or other logical group, for a pilot period. This will let you test your equipment and process changes and make any needed adjustments before implementing to the entire site. Review *Installation* manual for discussion of security keys and user roles.		
10	Identify physical changes (space planning and equipment) required to accommodate equipment (computer equipment, furniture, printers, etc.) and workflow changes.	Workgroup			

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11	Select metrics and determine baseline. Metrics should include clinical, business and administrative measures. Identify and document how the data will be collected and measured.	Workgroup	See *Metrics Planning* document (currently under development) on the web site for assistance in identifying and measuring. Identify the current statistics for selected metrics. Metrics should be baselined before <u>any</u> process change that occurs, even prior to fully implementing Patient Chart.		
12	If needed, schedule remote installation of Patient Chart on RPMS server.	Site Manager or Tech Lead	Contact Area Office for remote installation.		
13	Install Patient Chart on RPMS server. Set security keys based on Workgroup recommended roles.	Site Manager or Tech Lead	Review *Installation* document. Use *Security Keys* section to document user roles, based on *User Access Request* form.		
14	Install client software on each computer to be used by Patient Chart users	Site Manager	Review *Installation* document and/or contact ITSC Help Desk.		
15	Train users on Patient Chart software	Workgroup or ITSC training staff	ITSC offers training periodically on both technical and functional aspects of Patient Chart. Check the RPMS training web site for class schedule: http://www.ihs.gov/Cio/RPMS/TrainSched.asp The Patient Chart Coordinator, Site Manager or other Workgroup member who is very familiar with the application could also provide on-site training.		
16	Train staff on new or changed workflow processes	Workgroup	Any staff affected by new workflow, including physicians, nurses, pharmacists, lab staff, medical records, coders, or data entry, should be briefed on new procedures and processes.		
17	**Go Live**	Workgroup and selected users	Contact the ITSC Support Center for technical or user assistance: http://www.ihs.gov/Cio/RPMS/TechSupp.asp		
18	Establish routine meetings for feedback / updates for process changes and evaluation	Workgroup, pilot teams			

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19	Full site implementation	Workgroup	If your site opted for a trial implementation, steps 14 through 16 may need to be repeated to complete.		
20	Evaluate metrics 1 month, 3 months, 6 months, and 12 months after Go Live.	Assigned staff	Determine impact of Patient Chart on patient care, workflow, data, and/or revenues.		
21	Periodically (every 4-6 months) assess clinical user technology needs.	Site Manager	Use the *Technology Planning* worksheet to review how the user needs are changing as different technology tools are tested and implemented.		